

OKLAHOMA -- 2001 Community PASS Grant

Identified Problems with the States' Long-Term Care System

- The impact of service delivery upon the consumer's personal freedom is not a consideration; caregivers are directed by the provider, not the consumer.
- Program administrative entities lack manpower and tools for adequate quality oversight of provider service delivery.
- Providers have insufficient capacity and experience to deliver continuous quality services.
- There are widespread poor provider management practices.
- There are difficulties in providing timely, adequate responses to consumers desiring access to home and community-based services as an alternative to nursing facility institutionalization.
- There is an over utilization of nursing facilities to meet LTC needs.
- The state has low Medicaid nursing facility reimbursement rate (48th in the nation).
- The system has an inability to attract and retain direct care staff.
- The system has an inadequate number of direct care workers, and providers spread existing staff too thin. In some areas, only 50-60 percent of authorized services are actually being delivered.

Perceived Strengths

- Over the last four years, the number of nursing home eligible persons being served in the community through personal assistance and waiver services has increased 500 percent.
- Over the last 5 years, the number of nursing facility residents in Oklahoma decreased 6.8 percent.
- There is some experience in successfully creating and utilizing public/private partnerships to out-source administrative services.

Primary Focus of Grant Activities

- Create an infrastructure for intermediary service organizations to serve as a consumer's business agent and consultant for employer responsibilities.
- Design a quality assurance function into nurse's role.
- Make recommendations to change the state Nurse Practice Act to allow appropriate delegation.

Goals, Objectives, and Activities

Overall Goal. Create infrastructure that supports the availability of personal assistance services in a manner that affords consumers maximum control over the selection of individuals working on their behalf and the manner in which services are provided.

Goal. Establish partnership to guide systems changes.

Objectives/Activities

- Determine selection criteria and process for Oklahoma Partnership membership.
- Create Partnership Manual.
- Orient Oklahoma Partnership members to the Consumer-Directed Personal Assistance Services and Support (CD-PASS) Project goals and objectives.

Goal. Develop Independent Living Center (ILC)-based Intermediary Services Organizations (ISO) to serve as consumers' business agent and consultant for employer responsibilities.

Objectives/Activities

- Create CD-PASS infrastructure and develop ISO implementation plan.
- Develop CD-PASS ISO software that implements basic functions such as: tracking/contact of consumers and CD-PASS providers; provider trainings completed and registry of backup staff and availability.
- Produce and implement recommendations for Continuous Quality Improvement (CQI) contracting requirements for ISOs.
- Provide training and technical assistance to ISO providers to increase understanding of the CQI concept and the CQI contracting requirements.
- Secure Medicaid funding for CD-PASS and begin CD-PASS/ISO service delivery.

Goal. Modify current infrastructure to enable nurses to devote more time to Quality Assurance and Quality Improvement (QA/QI).

Objectives/Activities

- Redefine DHS nurses role to permit more time to be devoted to PAS QA/QI activities.
- Evaluate and revise the assessment instrument and LTC entry procedures to streamline the process for level of care assessment and eligibility.

Goal. Recommend revisions to the Nurse Practice Act to support appropriate delegation of nursing tasks to unlicensed personal assistants.

Objectives/Activities

- Evaluate and recommend needed modifications to the Nurse Practice Act to ensure that nursing tasks can be appropriately delegated to personal assistants, including family and friends.

- Research and develop recommendations and a policy leader's educational strategy to improve the nurse delegation provisions of the Oklahoma Nurse Practice Act, to allow flexibility necessary for delegation of nursing tasks to support Personal Assistance Services Programs.

Goal. Assure that PAS agency providers will incorporate consumer direction options and principles into service delivery.

Objectives/Activities

- Design and implement a training curriculum for agency providers.
- Guide the development of infrastructure and support for state-share funding match to expand State Plan PAS to educational and work settings.
- Guide the development of infrastructure for CD-PASS to allow the nature, extent, scope and setting of service delivery to be defined by an interdisciplinary team consisting of the consumer, case management provider, and, when appropriate, the home care nurse responsible for the service plan.
- Design a plan for modifying PAS to include Advanced PAS and Chronic Care Skilled Nursing services to more adequately meet the needs of persons who have severe disabilities and require nurse-delegated PAS.

Key Activities and Products

- Recommend revisions to Nurse Practice Act.
- Conduct a preliminary evaluation of CD-PASS ISO system performance in year 3.
- Develop an Oklahoma Partnership Manual.
- Develop a training curriculum for agency providers.

Consumer Partners and Consumer Involvement in Planning Activities

- CEOs and staff from Ability Resources and Progressive Independence (Independent Living Centers) provided concepts, suggested activities and gave feedback on proposed partnership, goals and activities.
- The Oklahoma Policy Consortium for Persons with Disabilities—through group meetings and individual member consultation-provided feedback and active endorsement of all grant concepts and principles.
- Grant concept papers were sent to all advocacy groups and feedback was solicited and incorporated.

Consumer Partners and Consumer Involvement in Implementation Activities

- Oklahoma Real Choices Planning Partnership (a.k.a. the Oklahoma Partnership) will be formed using grant resources. The Partnership will consist of consumers and advocates. DHS/ASD, LTCA of Tulsa, LTCA of Enid, Ability Resources, and Progressive Independence are Grant Partners and will provide grant administrative leadership, technical assistance, and staff support to the Oklahoma Partnership. Representatives of providers and other state agencies will be participants in the Partnership in a consulting capacity.
- Consumer and advocate Partnership members will receive travel reimbursement, respite care, meals, and lodging (as needed). In addition, each Partnership member will receive an Honorarium in the amount of \$200 per day (\$100 per 4 hours).
- After an orientation and education about different approaches other states have used to improve consumer choice and control, the Oklahoma Partnership will guide the development of infrastructure changes to maximize capacity for and assure quality CD-PASS service delivery.
- If it is not possible or desirable to develop CD-PASS through modifications of the State Plan PAS Program, strategies for implementation using a 1915(c) waiver will be explored. If waivers are used, the Oklahoma Partnership will guide modification of existing waivers, or the development and implementation of new waivers, to pilot the CD-PASS program.
- The Oklahoma Partnership will share CD-PASS infrastructure products with the DHS/DDSD for serving persons with mental retardation (as determined appropriate by DHS/DDSD).

Public Partners

- Department of Human Services Aging Services Division (DHS/ASD).
- Long Term Care Authority (LTCA) of Tulsa. LTCA of Tulsa is a local public trust authority that is the administrative agent for the ADvantage Program, the statewide waiver that services 10,500 frail elderly and adults with physical disabilities.
- Long Term Care Authority (LTCA) of Enid.

Private Partners and Subcontractors

- Ability Resources Independent Living Center (ILC).
- Progressive Independence ILC.
- The Community Service Council of Tulsa (will provide limited monetary support and space for Oklahoma Partnership meetings).

Public and Private Partnership Development/Involvement in the Planning Phase

Public Partners

The Research Director, CEO, and Director of the Center for Health Care Concepts of the LTCA of Tulsa, along with DHS/ASD administrative staff wrote the CD-Pass Grant.

Private Partners

- Ability Resources and Progressive Independence ILCs—provided feedback and active endorsement of all grant concepts and principles.
- Ability Resources Director, Progressive Independence Director, the CEO, Director of Research and Director for the Center for Health Care Concepts of the LTCA of Tulsa all attended the Real Choice Systems Grant Solicitation Conference and met during the conference to discuss concepts and major activities for inclusion in the grant proposal.

Public and Private Partnership Development/Involvement in Implementation**Public Partners**

- The administrative leaders of DHS/ASD, OHCA, and the LTCAs of Tulsa and Enid will meet periodically. The meetings will serve as a vehicle for systems coordination and systems-level quality oversight of the PAS program. During the meetings there will be discussion/debate/troubleshooting on issues related to access and service delivery.
- DHS/ASD is contracting with LTCA of Tulsa to staff and support grant activities.
- LTCA and DHS/ASD will create a Partnership Manual.

Private Partners

- Directors of Ability Resources ILC and Progressive Independence ILC participate as Grant Partners with DHS/ASD and LTCA of Tulsa and Enid to further develop and implement the CD-PASS strategic plan and workplan.
- Directors of Ability Resources ILC and Progressive Independence ILC, along with LTCA of Tulsa Grant partner representatives, consulted with Kansas Medicaid administrators and Topeka Independence Living Resource Center staff to learn about Kansas Self-Directed PAS for planning grant implementation.

Oversight/Advisory Committee

- The Oklahoma Real Choice Planning Partnership will guide several grant activities.
- The Grant Partnership Strategic Planning and Oversight Team.

Formative Learning and Evaluation Activities

- The Project Director will use project management software to track progress.
- Preliminary evaluation of CD-PASS ISO system performance in Year 3.

Evidence of Enduring Change/Sustainability

The following planned changes to the long-term care infrastructure will ensure that enduring changes will result.

- Model CD-Pass ISO software will improve the efficiency and quality of fiscal intermediary and consulting services delivered by ISOs to CD-PASS consumers and workers. Appropriate CD-PASS ISO software will enable rapid development of capacity in second generation ISO providers beyond the duration of the grant period.
- Requiring ISO providers to have an approved internal infrastructure that supports CQI as a condition of provider participation will improve service quality, delivery capacity, and service system value for CD-PASS to build the necessary capacity for rapid service delivery.
- All service delivery infrastructure activities identified in Oklahoma's grant application will be implemented by the end of the grant funding period. Sustained funding for grant infrastructure creations will follow through State Plan PAS and Medicaid waiver funding.

Geographic Focus

Tulsa MSA; statewide applicability.